

TEACHERS' RETIREMENT BOARD
BENEFITS AND SERVICES COMMITTEE

SUBJECT: LEVEL OF SERVICE STANDARDS

ITEM NUMBER: 9

ATTACHMENT: 1

ACTION: _____

DATE OF MEETING: July 13, 2000

INFORMATION: X

PRESENTER(S): Michael Carter

EXECUTIVE SUMMARY

The Level of Service report provides the Benefits and Services Committee with the necessary information to fulfill its oversight responsibility regarding the delivery of benefits and services to CalSTRS members. The following reports for the month of May 2000.

I. Overview

- A. Fiscal Year Allowance Roll: CalSTRS paid a total of 162,366 benefit recipients \$279,797,490 in May 2000. The average monthly allowance roll for FY 1999/2000 is \$278,324,717. Total disbursements for FY 1999/2000 are \$3,061,571,889.
- B. Service Levels: All programs are performing within acceptable variance levels.
- C. Application Volume: An overall increase of six percent in comparison to the same period last fiscal year.
- D. Interest Payments: The total interest payment volume for May 2000 increased nine percent as compared to May 1999. The dollar amount of interest paid increased fifty-five percent as compared to May 1999.

II. Individual Program Reports: Pages 1-7

III. Miscellaneous Items: Pages 8 - 9

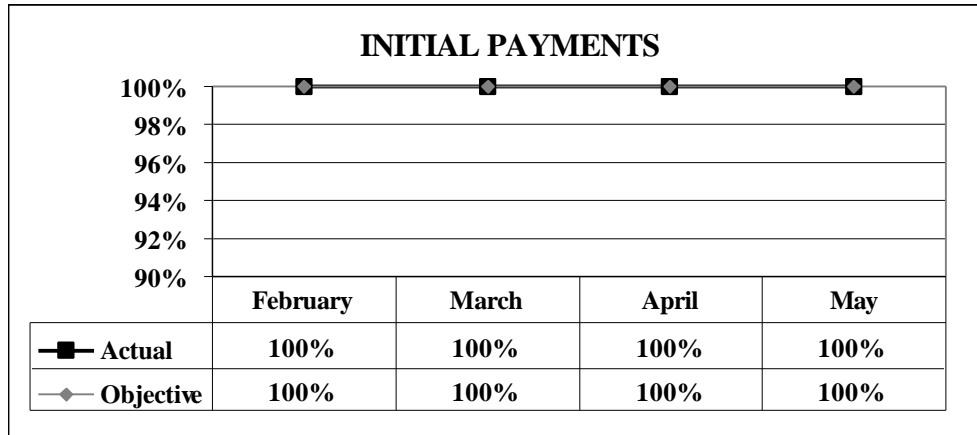
CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Service Retirements

Objective Process 100 percent of all service retirement application payments within 30 days of the retirement effective date or receipt of completed application, whichever is later.

Application Volume Change Minus one percent in comparison to same period last fiscal year.

Baseline FY 1998/99 actual: 99 percent

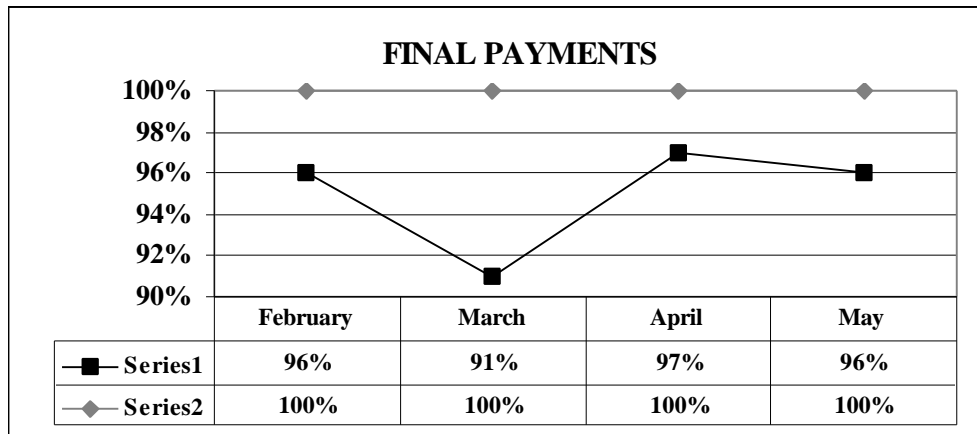


Year to Date Average: 100%

Objective Process 100 percent of all final service retirement payments within 45 days of receipt of all necessary information.

Interest Payments July 1999 – May 2000
Number of Payments: 311
Dollar Amount: \$2,013

Baseline FY 1998/99 actual: 98 percent

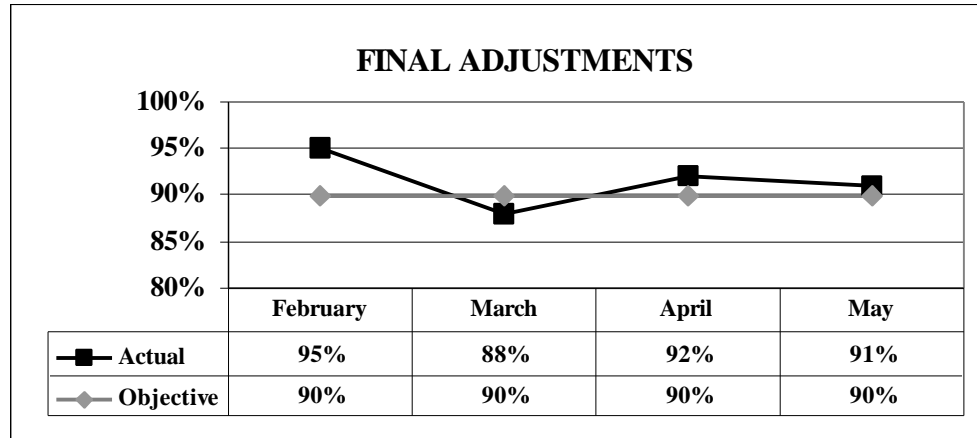


Year to Date Average 96%

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Service Retirements

Objective Finalize 90 percent of all payments within four months of the retirement effective date.



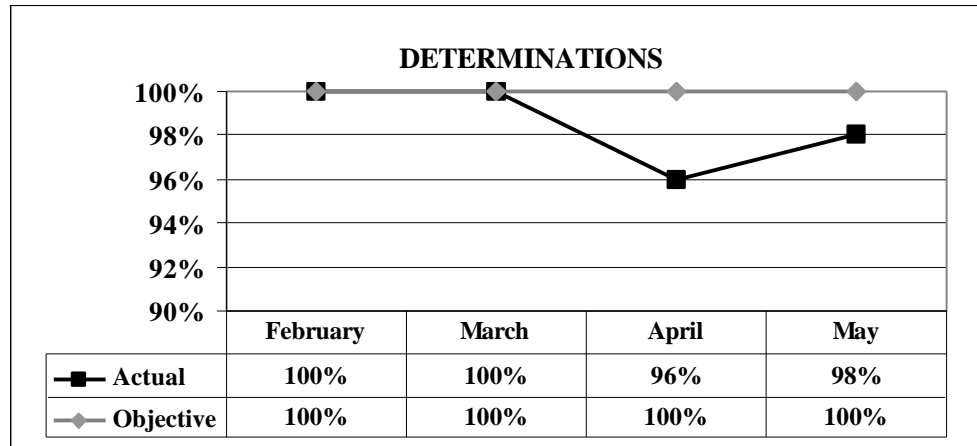
Baseline FY 1998/99 actual: 91 percent

Year to Date Average: 92%

Disability

Objective Process 100 percent of all eligible applications within 180 days of receipt.

Application Volume Change Plus eighteen percent in comparison to same period last fiscal year.



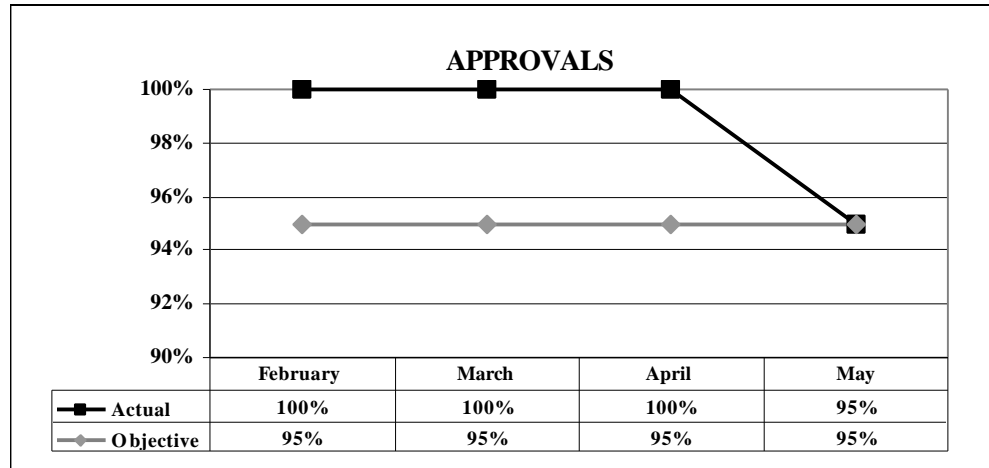
Baseline FY 1998/99 actual: 99 percent

Year to Date Average: 98%

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Disability

Objective Process 95 percent of all approvals within 30 days of receipt of all necessary information.

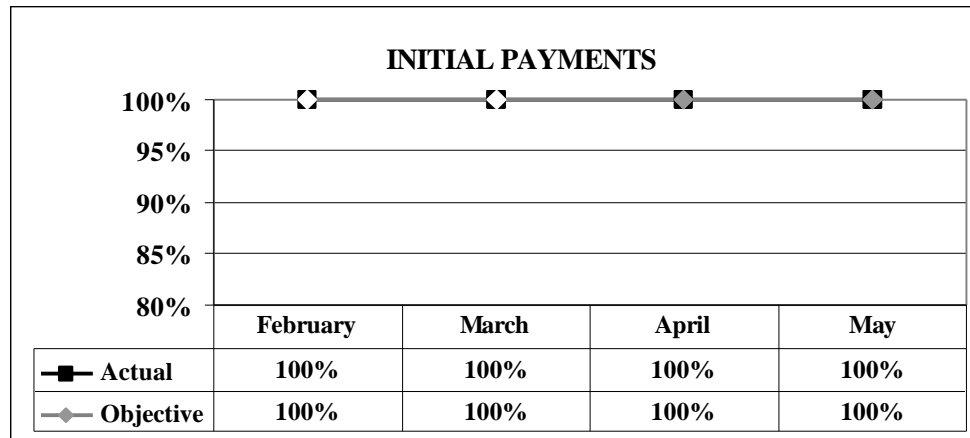


Baseline FY 1998/99 actual: 100 percent

Year to Date Average: 99%

Objective Process 100 percent of all initial payments within ten working days following the latter of the disability approval date, disability effective date or receipt of all necessary information.

Interest Payments July 1999 – May 2000
Number of Payments: 0
Dollar Amount: \$0



Baseline FY 1998/99 actual: 100 percent

Year to Date Average: 100%

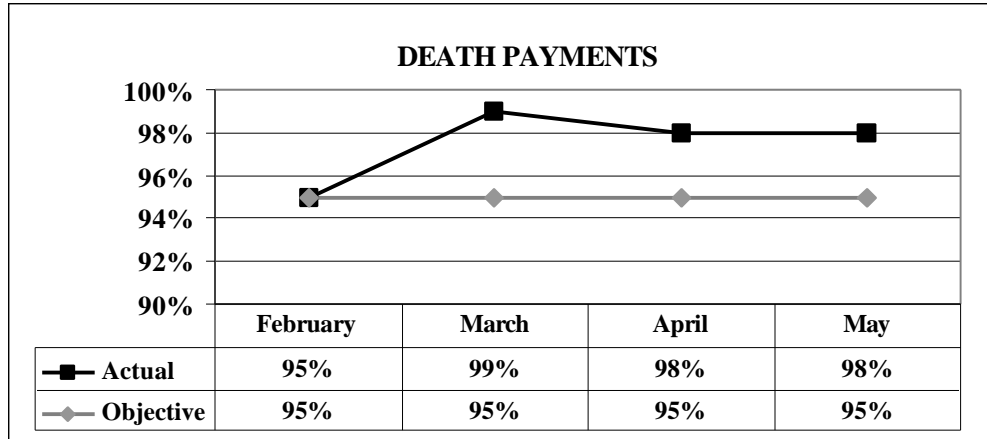
CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Survivor Benefits

Objective Process 95 percent of all applications within 30 days of receipt of all necessary information.

Application Volume Change Thirteen percent increase in comparison to same period last fiscal year.

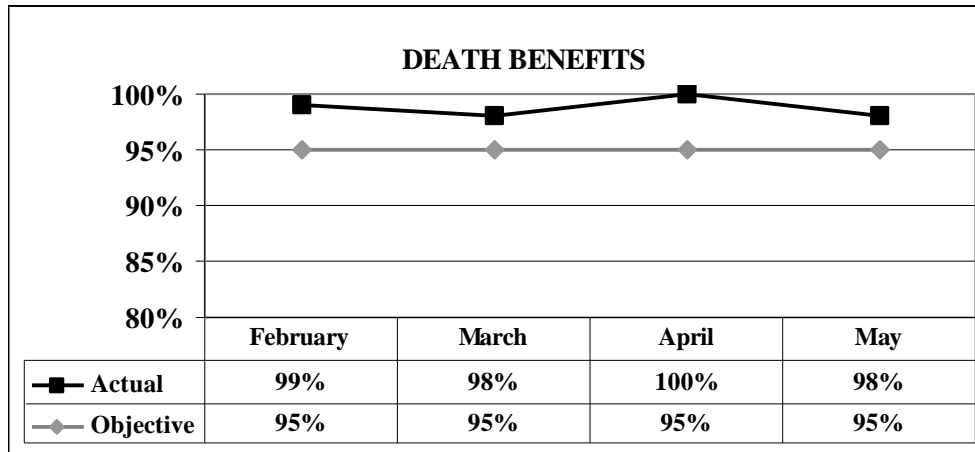
Interest Payments July 1999 – May 2000
Number of Payments: 173
Dollar Amount: \$21,497



Baseline FY 1998/99 actual: 97 percent

Year to Date Average: 97%

Objective Complete 95 percent of all payments for retired members within 90 days of receipt of notification of death.



Baseline FY 1998/99 actual: 93 percent

Year to Date Average: 98%

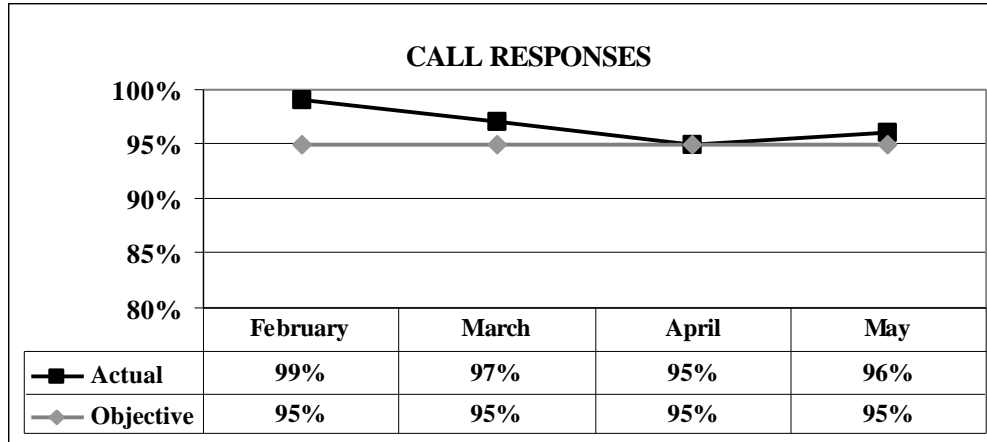
CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Public Service

Objective Answer 95 percent of all calls in less than three minutes.

Volume Change -9.43 percent decrease.

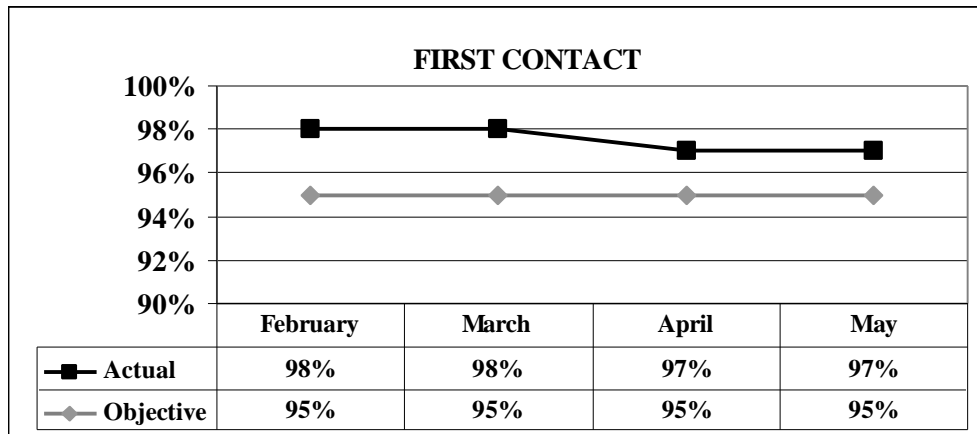
Notes Average queue time: 39 seconds
Longest queue wait: nine minutes



Baseline FY 1998/99 actual: 94 percent
FY 1996/97 Objective:
75 percent/less than three minutes.

Year to Date Average: 93%

Objective Answer 95 percent of all calls on the first contact.



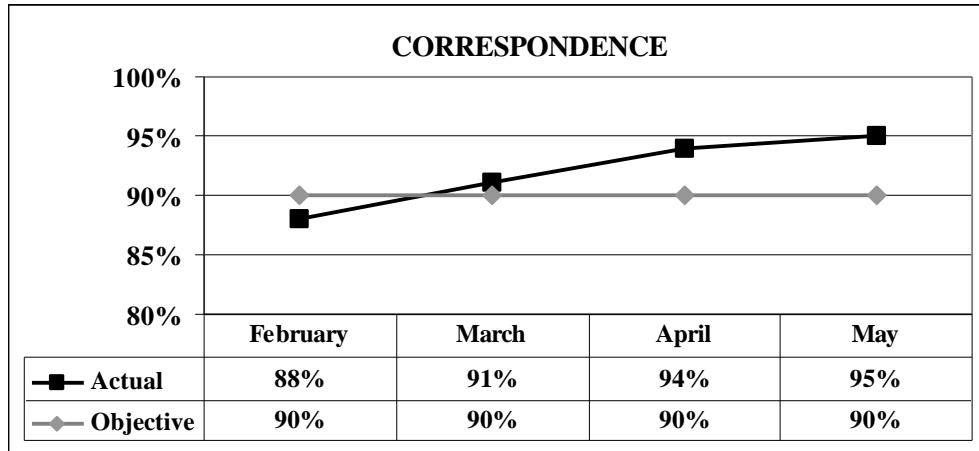
Baseline FY 1998/99 actual: 98 percent

Year to Date Average: 97%

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Public Service

Objective Respond to 90 percent of all correspondence in ten working days.

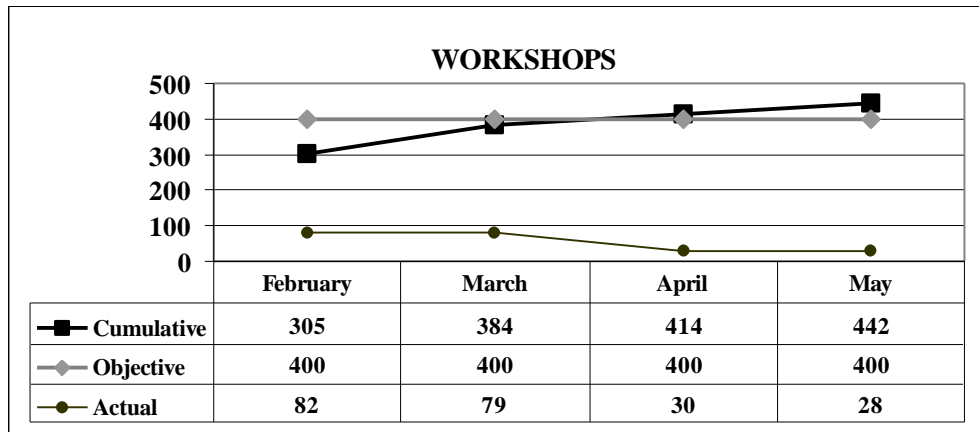


Baseline FY 1998/99 actual: 94 percent

Year to Date Average: 93%

Regional Counseling Services

Objective Conduct 400 workshops

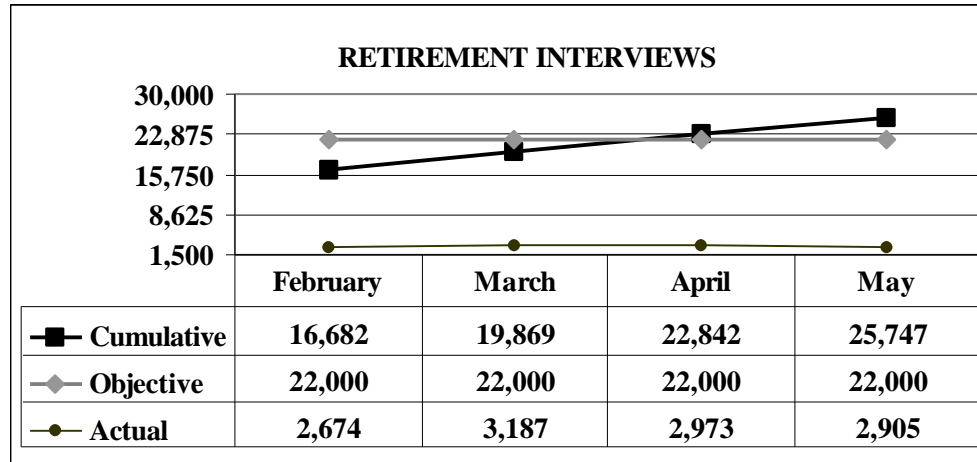


Baseline FY 1998/99 actual: 491

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

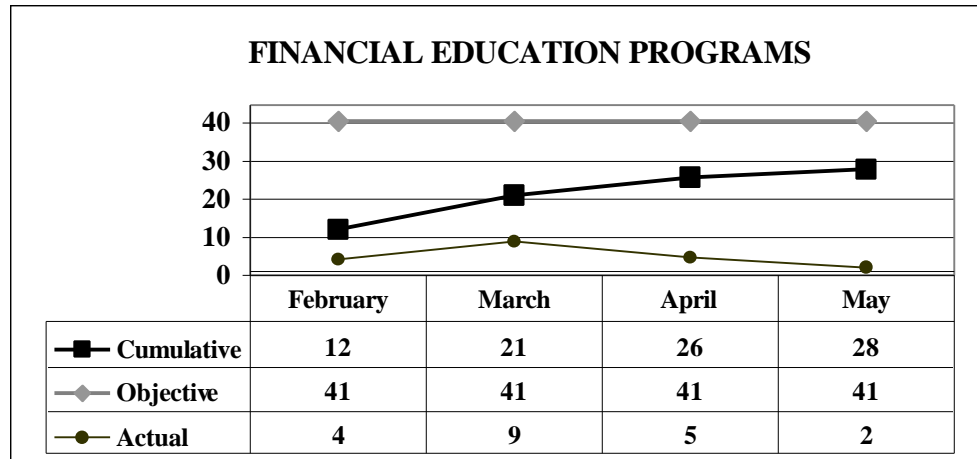
Regional Counseling Services

Objective Provide 22,000 retirement interviews.



Baseline FY 1998/99 actual: 24,657

Objective Deliver 41 Financial Education Program to CalSTRS members.



Baseline FY 1998/99 actual: 32

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

III. Miscellaneous

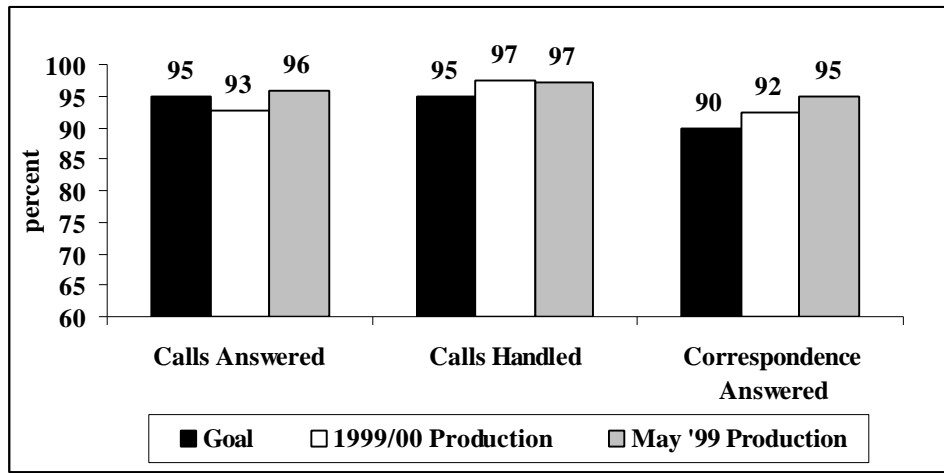
A. Outstanding Survivor Benefit Cases: The Education Code requires a report to the Board on outstanding Survivor Benefit cases not paid within six months of the notification of death. As of May 2000, there were 85 cases exceeding this threshold. In April 2000, there were 106 cases beyond the six-month processing period, while in March there were 114 cases exceeding the six-month threshold.

B. One-Year Final Compensation: During the current fiscal year, three school districts have chosen to participate in this program.

C. Golden Handshake:

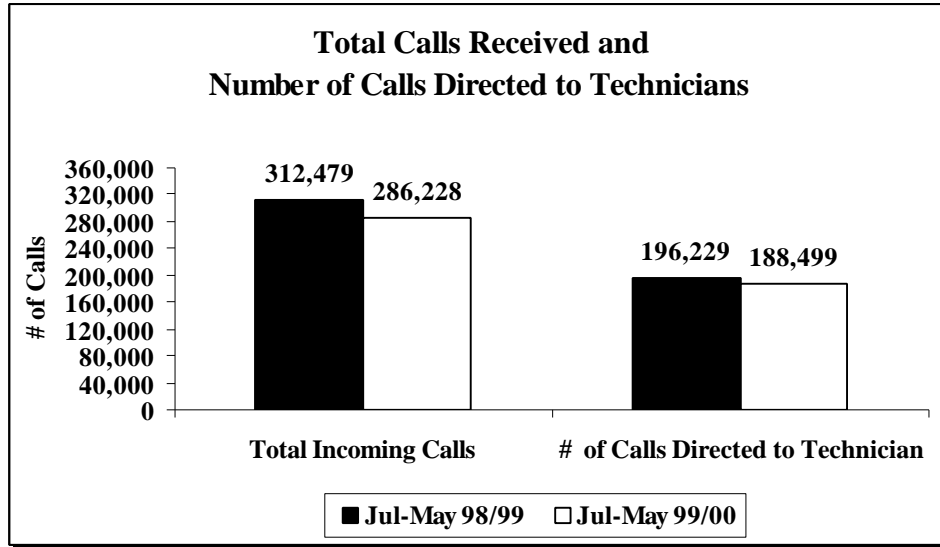
July – May 1999	191 districts / 235 participants
July - May 2000	88 districts / 144 participants

D. Telephone Center:



CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

D. Telephone Center: (continued)



Type	(1) Benchmark 90/91	(2) July-May 98/99	(3) July-May 99/00	% of Change $\frac{(3) - (2)}{(2)}$	May 2000
Total Incoming Calls	195,858	312,479	286,228	-8.40%	25,485
Technician Calls	117,913	196,229	188,499	-3.94%	18,101
Automated Attendant Calls	31,895	79,995	62,089	-22.38%	5,197
Teletalk Calls	46,050	36,255	28,256	-22.06%	2,187